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Applicant : Isaac J. William et al.
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Examiner : Almatrahi, Faris S.

Docket Number : OR01-17301
Customer No. : 51067

Interview Summary filed
Via Electronic Filing

INTERVIEW SUMMARY

Dear Examiner Almatrahi:

In response to the telephone interview conducted on **Tuesday, 9 June 2009**, please find a record of the interview below.

Identification of Claims and References Discussed

Claim discussed: Claim 1

References discussed: Maritzen (US 5,987,429); and Bross (US 2003/0105687).

Applicants' Arguments

In the embodiments of the present invention, a tax rules navigator gets a rule from a set of tax rules. The tax rule points to a configurable driver template, which points to a group of conditions. If all of the conditions are satisfied, the appropriate process result is retrieved. If one of the conditions are not satisfied, the next tax rule is examined. (*See* Instant Application at paragraphs [00123]-[00124]). By definition, a driver is an input that affects the outcome of one or more processes. A driver template is used to group two or more drivers that may

simultaneously affect the outcome of one or more processes. A tax rule specifies the driver template to use *for a specific process*. (See Instant Application at paragraphs [00115]-[00116] and [00119]). Accordingly, different tax rules specify different driver templates *for different processes*.

By contrast, in Bross, “[o]ne and the same filing service can be used for different jurisdictions, and *the processing steps to be performed* by the user are *the same for all jurisdictions*.” (See Bross, at paragraph [0141]). Therefore, Applicants respectfully submit that Bross fails to disclose the recited limitations of amended claim 1 that “responsive to tax rule not applying to the transaction and wherein additional tax rules exist, the method further comprises applying *a next tax rule which specifies a next configurable template for a next process* in the order of precedence.” This is because Bross uses the *same* process for all different jurisdictions.

Moreover, as Examiner correctly noted in paragraph 8 of the Office Action, Maritzen fails to disclose using configurable template. Thus, Maritzen cannot disclose applying a next tax rule which *specifies a next configurable template for a next process* in the order of precedence.

Proposed Amendment

1. (Currently amended) A method for determining taxes for a transaction by applying tax rules specified using configurable templates in a computer system, comprising:

receiving the transaction for which taxes are to be determined;

examining a configurable template associated with a tax rule,

~~wherein the configurable template identifies a set of
attributes associated with the transaction,~~

wherein the tax rule specifies the configurable template to
use for a specific process,

wherein the configurable template includes one or more drivers to facilitate ~~the~~ configuration and reusability of the configurable template in the tax rule ~~rules~~,

wherein ~~the drivers are the~~ each driver identifies a set of attributes associated with the transaction that act as an input to the specific process, and

wherein the tax rule is produced by the computer system ~~using the configurable template from~~ by interpreting abstracted tax authority rules;

examining a set of conditions for the set of attributes identified by the driver;

~~when~~ responsive to each condition in the set of conditions ~~[[is]]~~ being satisfied, using a process result ~~associated with the set of conditions in determining~~ to determine a tax for the transaction, wherein the process result indicates the outcome of ~~[[a]]~~ the specific process associated with the tax rule condition; and

~~wherein when the~~ responsive to tax rule ~~does not apply~~ applying to the transaction and wherein additional tax rules exist, the method further comprises applying ~~the~~ a next tax rule which specifies a next configurable template for a next process in the order of precedence ~~in the process of determining the transaction, wherein the additional tax rules are applied in a sequence determined by a precedence ordering of the additional tax rules.~~

Correction of Inventorship

Applicants also wish to discuss the petition for correction of inventorship filed on 14 January 2005 and request consideration of adding **Paulo Back** to the list of inventors.

Outcome of Interview

The Examiner suggested further clarify the arguments and incorporating limitations of dependent claim 2 to overcome potential obviousness rejection based on other related prior arts in the field.

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